Setup Guide-Mobility

ActiveSync – Hosted Exchange Configuration

Live Customer Support: 866-428-0128

Setup Instruction for Mobile Device Connection to Exchange – ActiveSync

ActiveSync (aka Windows Mobile) is the wireless service built into Exchange for communicating with - Smart Phones‖. Initially, this pertained primarily to mobile devices with the Windows Mobile 5 or 6 operating system in the early 2000's. However, the Smart Phone category has evolved greatly in the last several years to include mobile operating systems that include **iOS** (Apple's mobile platform for iPhones, iPod Touch and iPad), Google's **Android OS** which is licensed to several different handset manufacturers, **WebOS** which runs on HP/Palm Pre and Pixi devices (and possibly on future HP mobile devices), current **Windows Phone 7** phones, and several other devices that license ActiveSync from Microsoft in order to provide wireless communication to the Exchange enterprise platform which is ubiquitous in the business community.

Smart Phones with an operating system of Windows Mobile 6, or later, typically synch email, contacts, calendar, and tasks with an Exchange mailbox. The features associated with ActiveSync enabled phones may differ depending upon the phone device itself or the nature of the licensing agreement for utilizing ActiveSync.

General Settings for ActiveSync

Because of the popularity of Exchange, mobile ActiveSync has been licensed to a multitude of handset manufacturers and mobile Operating Systems. The numbers of ActiveSync compatible devices are too many to document in totality, and the exact settings or menu options will vary from device to device, but the setup requirements are pretty standard requiring the following information.

Email: Your email address

Domain: **Collaboration**

a. This field is typically optional. If needed use the Apptix Exchange domain…not your domain.

Username: Your User ID (This is your windows user name ***Ex:*** *john.doe, not your email address)*

Password: Your password (*case sensitive*)

Description: You can enter any information you would like in this field.(*Ex: Display Name).*

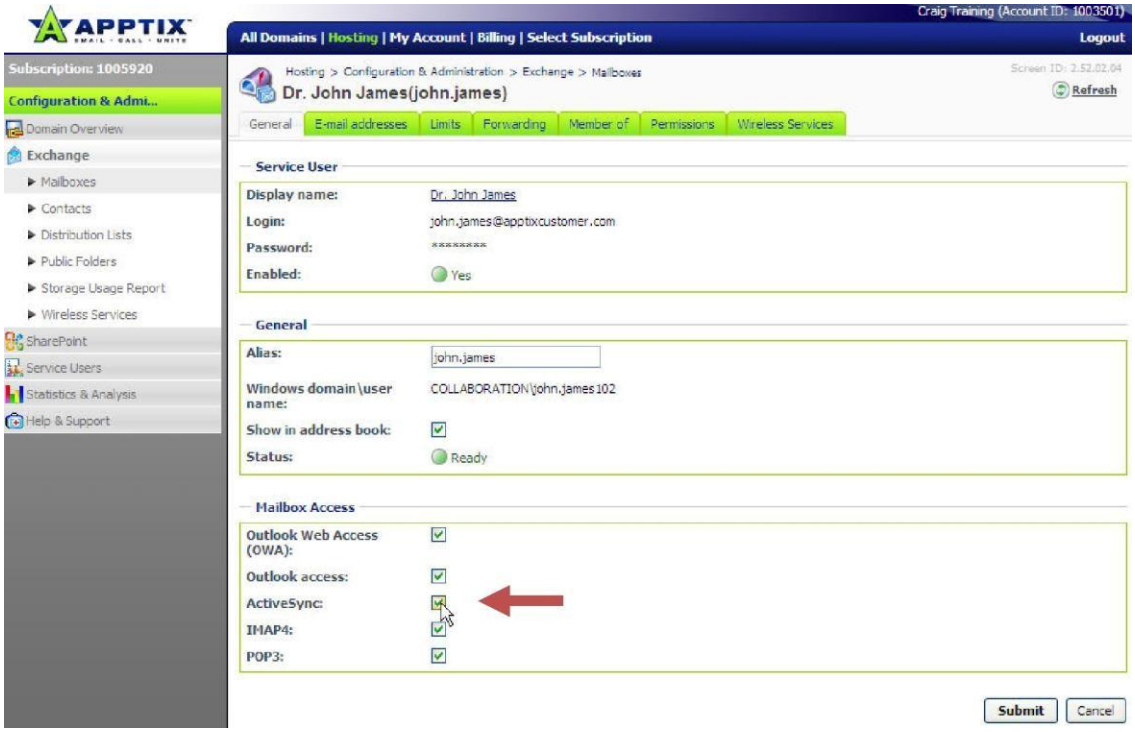
Server: **mobile.apptixemail.net**

NOTE: Typically three (3) folders will synch with Exchange using ActiveSync: **email, contacts, calendar** for most devices. Notes and Tasks are typically not included as part of the ActiveSync synchronization, but the type of information that will sync is device dependent based upon the device manufacturer's license agreement with Microsoft, and can vary widely from device to device.

Making Sure Your Mailbox is ActiveSync Enabled

ActiveSync must be enabled for each User's Exchange mailbox in order to synchronize data wirelessly from your Exchange mailbox to a mobile handset that allows for Exchange communication via ActiveSync. If this option is not turned on, then you will not have any success setting up the mobile handset.

1. Make sure that you have the ActiveSync option turned on for your mailbox via the Hosting Control Panel. Access the ActiveSync option for any User's mailbox via the Control Panel by selecting **Hosting** | **Exhange** | Click on the User's Display Name hyperlink | **General** Tab | Check the **ActiveSync** checkbox option.



2. If the ActiveSync option is not available to be selected, you will need to purchase the ActiveSync resource(s) for your account via the **Billing | Update Wizard** option of the Hosting CP.

Additional Sections in this Mobility-ActiveSync Setup Guide

iPhone Setup (All iOS4 devices) – page 4

Android OS and most other Smart Phones – page 7

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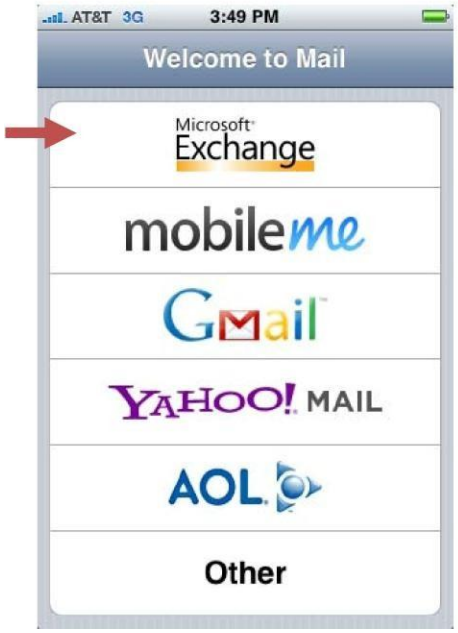
Configuring ActiveSync for the iPhone (iOS4)

The following instructions are for the latest version of the iOS4 platform. iPhone OS3 also allows connection to a single Exchange mailbox using ActiveSync and the setup instructions are similar to those outlined below, though the screens may be slightly different.

1. From the Home screen select **Settings | Mail, Contacts, Calendars > | Add Account…**

2. Click on the **Microsoft Exchange** option.

> **NOTE:** With iOS4 you can add multiple Exchange Accounts to the iPhone using ActiveSync to synchronize Email, Calendar and Contacts for multiple mailbox(es).
>
> Earlier versions of the iPhone OS ***do not*** have the ability to connnect to multiple Exchange accounts via ActiveSync. However, the POP or IMAP account settings can be used to connect to secondary multiple Exchange mailbox(es) using iPhone OS prior to 4.0.



4. The **Exchange** window is displayed. Enter your account details and select **[Next]**:

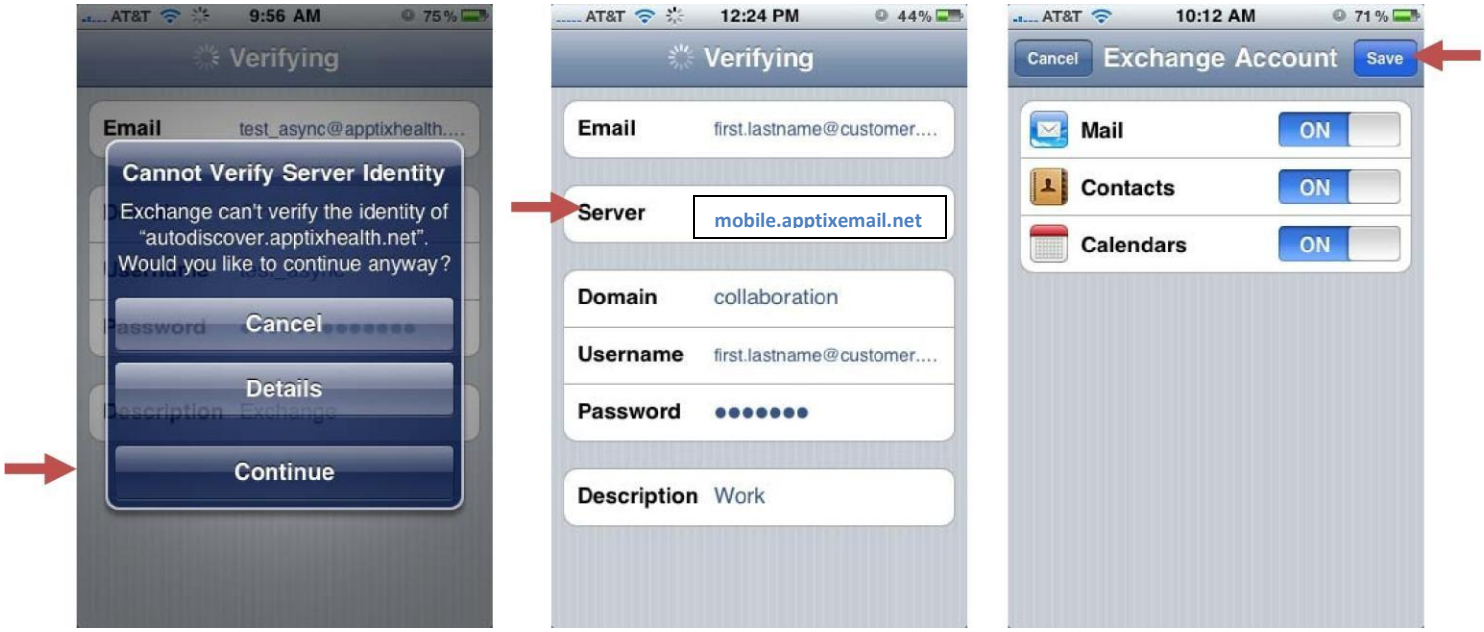
Email: Your email address
Domain: **Collaboration** (Optional. For some devices you may leave this blank).
Username: Your User ID (This is your windows user name ***Ex:*** *john.doe, not your email address)*
Password: Your password (*case sensitive*)
Description: You can enter any information you would like in this field.

a. This field defaults to the email address entered (first instance of an Exchange account), or - Exchange‖ if this is not the only Exchange account.
b. Optionally, you may select the field and edit it to meet your needs (***Ex:*** *Work, Personal, Firstname Lastname, etc.*)

4. The iPhone will try to connect to Exchange using the autodiscovery detection. If autodiscovery fails a warning message is displayed. Select **[Continue]** in order access the Server field for manual configuration. The **Server** field is now displayed so that you can enter the correct server information. Enter the mobility server information and click **[Next]**.

   Server: **mobile.apptixemail.net**

5. The iPhone will try to verify the settings by communicating with the Exchange server. If successful the **Exchange Account** window is displayed so that you can identify the items to be synced between your iPhone (iOS4) device and your Exchange mailbox(es).



6. Select which items you would like to sync with Exchange and then select **Save**.

You have now successfully configured ActiveSync on your iPhone.

Repeat Steps 1) – 6) above for each additional Exchange ActiveSync account you wish to manage on your iPhone (iOS4) device.

Other Important ActiveSync Settings for iPhone (iOS4):

Set Schedule for receiving email: Use this to determine if you want to use Push email (sent to the iPhone as soon as mail is delivered to the Exchange Server) or to set a delivery schedule for email.

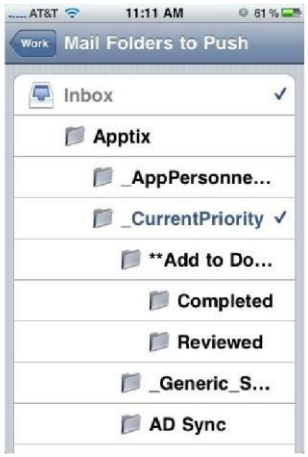
- **Settings | Mail, Contact, Calendars > | Fetch New Data | Push (On/Off) >|** ○ **Push (Off) | Fetch Schedule: 15 Minutes, 30 Minutes, Hourly, Manually**.

NOTE: Push/On = Real-time email delivery. Battery life is impacted the more often you receive email.

AT&T 11:06 AM 62%
Mail...
Fetch New Data
Push
OFF
New data will be pushed to your iPhone from the server.
Fetch
The schedule below is used when push is off or for applications which do not support push. For better battery life, fetch less frequently.
Every 15 Minutes
Every 30 Minutes
Hourly
Manually

Determine how much email is pulled into each folder and the folders to be synched: 3 days is the default. Check these settings if you don' t see email coming to your Inbox/folders as expected (***Ex:*** *Missing email from 5 days ago, etc*.).

- **Settings | Mail, Contact, Calendars > | Select Account | Mail Days to Sync | Select schedule** ○ **Mail Folders to Push** (when synching) **| Select folders to be synched**



Other – Smart Phones‖ —Android, WebOS, Etc.

There are a proliferation of various - smart phones‖ that utilize Microsoft's wireless ActiveSync protocol to communicate with Exchange server mailboxes. The most popular of these smartphones are using Google's Android Operating System. The types of devices/manufacturers include:

Motorola Droid, DroidX, Droid2 and Incredible
HTC Hero and EVO 4G
Samsung Galaxy Series of smartphones
Various LG handsets, and other devices by smart phone manufacturers
Dell Streak
HP/Palm Pre and Pixi *(These are WebOS smartphones, not Android)*

NOTE: Please check with your device manufacturer if you are unsure if the device will work with ActiveSync. There are devices that utilize other operating systems that may not be ActiveSync compatible (Ex: Symbian OS (Nokia) and some others), but the mobile industry is very fluid and Exchange is a popular email platform for business so ActiveSync is often licensed to any manufacturer wanting to appeal to the broadest possible market.

Each of these Smart Phone devices should be able to connect to your hosted Exchange mailbox in the following manner:

1. Make sure that ActiveSync is enabled for your mailbox via the Apptix Control Panel. If unsure, please contact your company Administrator or Apptix Customer Support.

2. On the Smart Phone handset itself, enter the following information:

   Server: **mobile.apptixemail.net**
   Email: Your email address
   Domain: **Collaboration** (Optional. For some devices you may leave this blank)
   Username: Your User ID (This is your windows user name Ex: john.doe, not your email address)
   Password: Your Exchange mailbox password (*case sensitive*)
   Description: You can enter any information you would like in this field.
   Typically this is your Display Name (Ex: Joe Carpenter) or Email address.

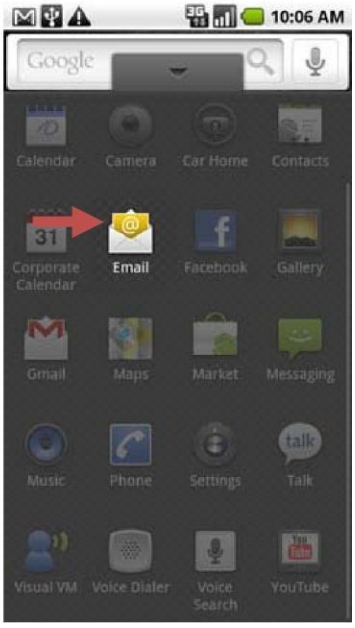
3. Select the folders to be synchronized between your Exchange maibox and your Smart Phone handset.

NOTE: Typically three (3) folders will synch with Exchange using ActiveSync: **email, contacts, calendar** for most devices. Notes and Tasks are typically not included as part of the ActiveSync synchronization, but the type of information that will sync is device dependent based upon the device manufacturer's license agreement with Microsoft, and can vary widely from device to device.

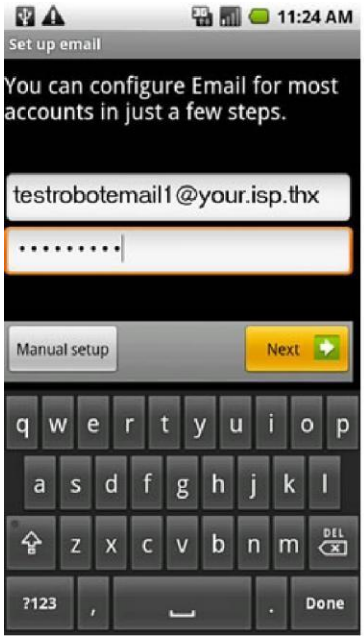
Setup of Motorola Droid

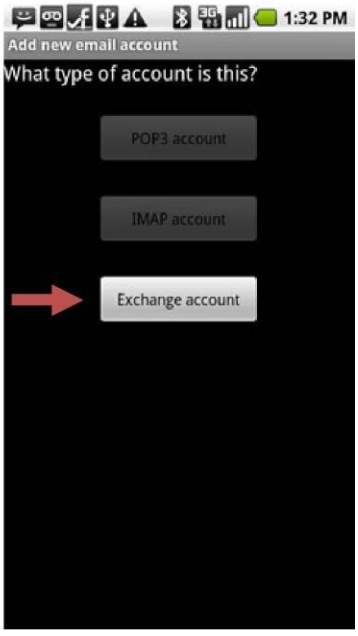
The following is an example of the setup of an Android handset device (the Motorola Droid). This setup is - typical‖ of Android handsets, but the Activesync setup for your specific device will differ depending upon the manufacturer and carrier.

1) From the home screen, touch the **applications tab** (located on the bottom of the screen). | Touch **Email**.

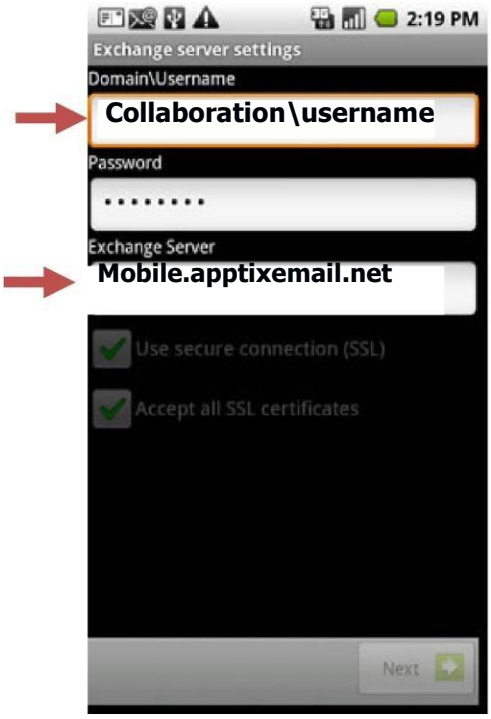


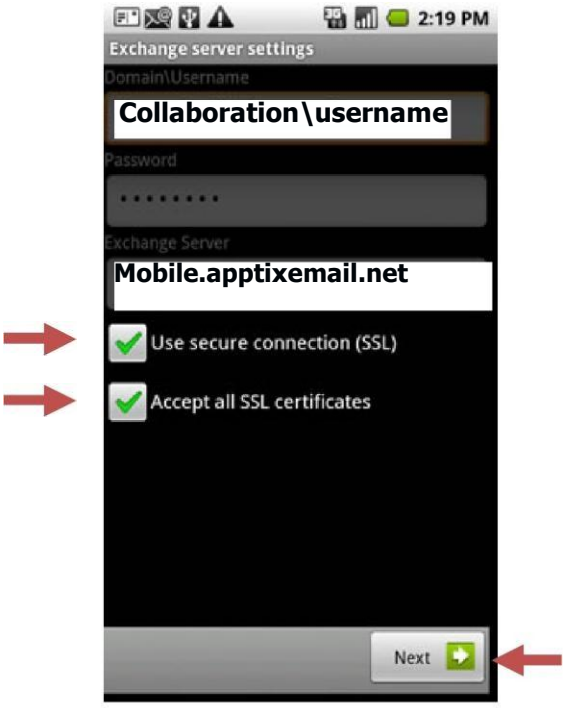
2) Enter the exchange email address and password then touch **Next**. | Touch **Exchange account**.



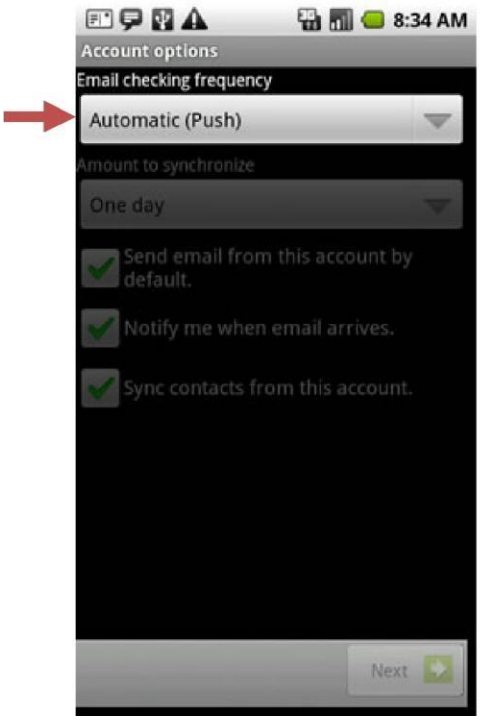


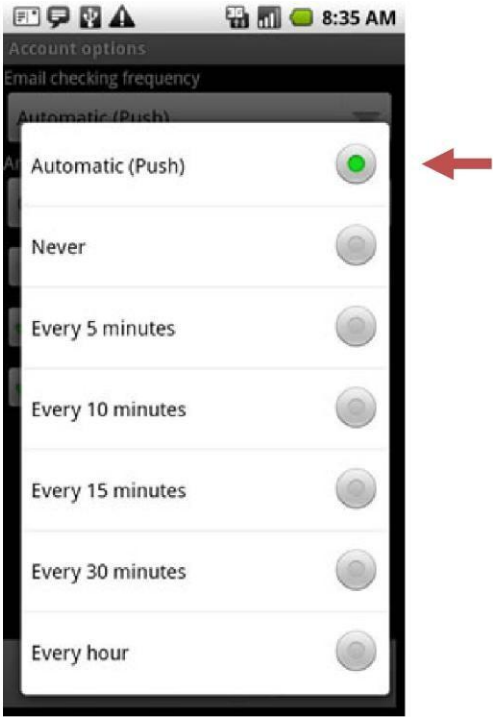
3) Enter the Exchange server settings in the appropriate fields: a. domain\user (**Collaboration**\yourUserName) b. password: YourPassword (case sensitive) c. Exchange Server: **mobile.apptixemail.net** | Ensure Use secure connection (SSL) and Accept all SSL certificates are checked then click **Next**



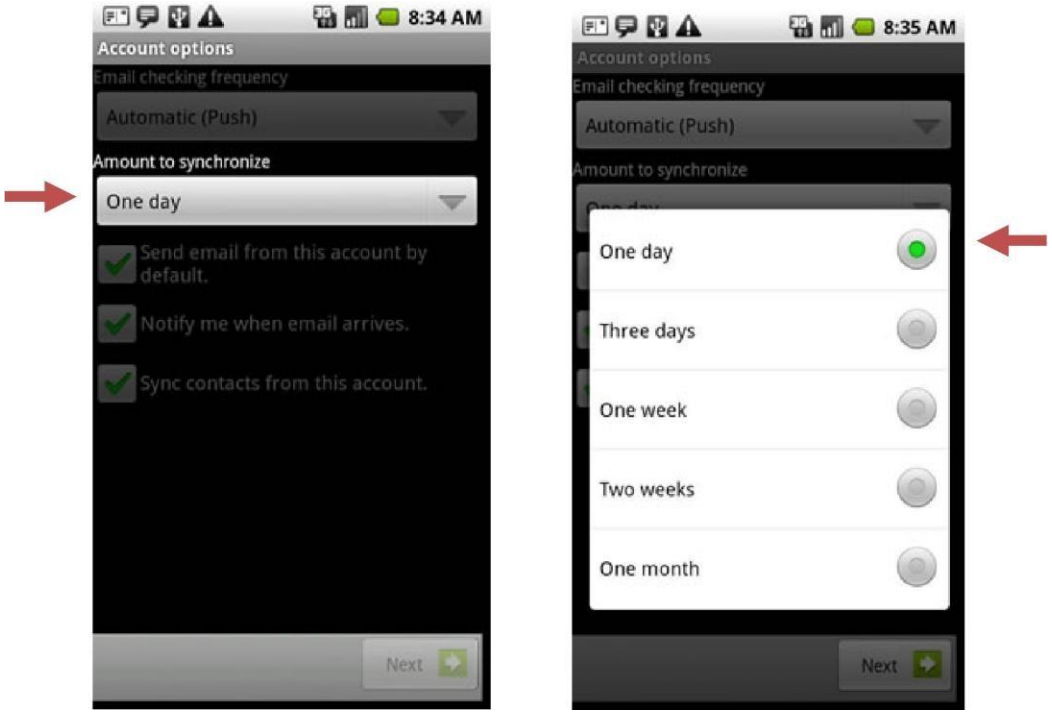


4) Touch the **Email Checking frequency** dropdown | Touch the desired frequency

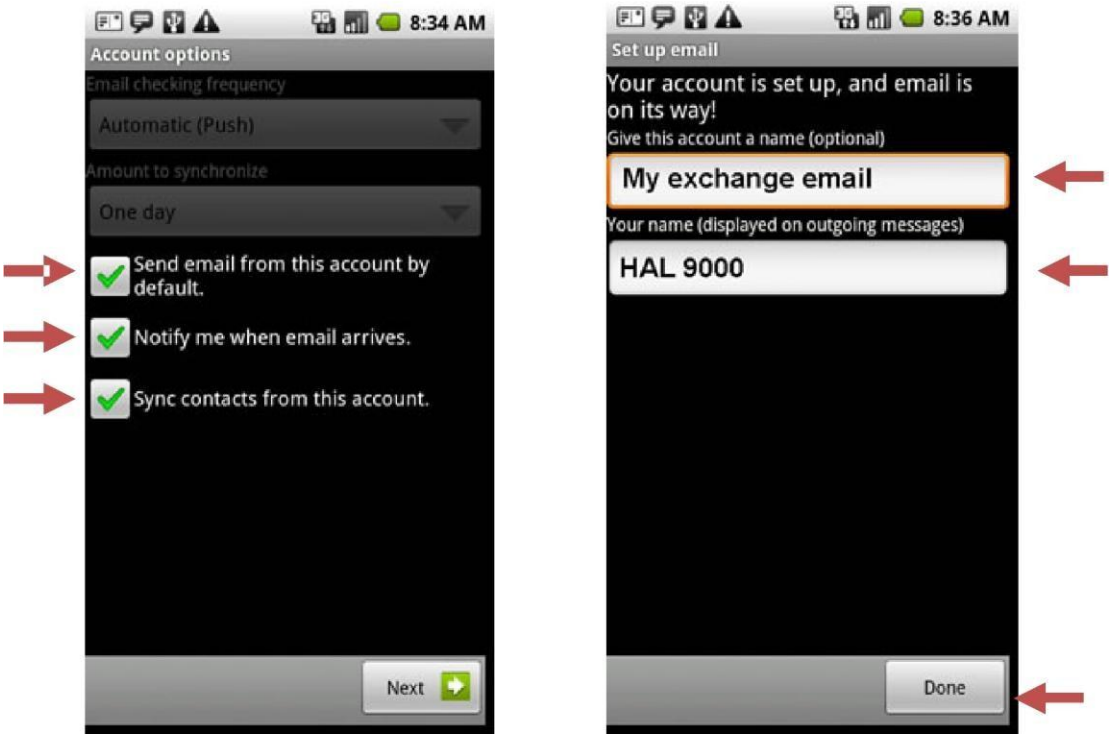




5) Touch the **Amount to synchronize** dropdown. | Touch the desired amount.



6) Touch the desired account options then touch **Next**.
   - The account option is enabled if a green check mark is present | Enter an account name and outgoing message name then touch **Done**



Configuring ActiveSync for Windows Mobile Devices

Microsoft is currently in the process of - revamping‖ their offering of smart phones. Historically, the Microsoft operating system has been Windows Mobile 5.0, 6.0 and 6.5 (WM6, etc.), but these devices have typically relied on stylus input and have fallen out of favor. Nevertheless, there is a large embedded base of WM6 users and the setup instruction for such devices is noted below.

Windows Phone 7

The introduction of Windows Phone 7 is scheduled to be released for the 2010 holiday season. Windows Phone 7 devices will utilize ActiveSync for Exchange synchronization and can be configured using the general ActiveSync setting. Additional information for configuring Windows Phone 7 will be made available when the Windows Phone 7 devices are released for consumer use.

From the Microsoft website, following are the setup instructions for configuring Exchange-based email on a WP7 handset:

To set up a Microsoft Exchange email account

You can use the following steps to set up an email account that is on a Microsoft Exchange Server. (For example, your email account at work might be on a Microsoft Exchange Server.) You can also use the steps in the following procedure to set up other email accounts that use Exchange ActiveSync—including a hosted Microsoft Exchange email account or an Outlook Web App account.

1) On **Start**, flick left to the **App** list, tap **Settings** , and then tap **Email & accounts**.

2) Tap **Add an account** > **Outlook**.

3) Tap the **Email address** box, and then type your email address for your Exchange Server email account.

4) Tap the **Password** box, and then type your Exchange password.

5) Tap **Sign in**.

6) Do one of the following, depending on if the account settings are found:

   - If the account settings are found, wait for your Exchange Server email, calendar, and contacts to be synced to your phone. You're all done setting up your account. Go to the last step in the procedure.
   - If the account settings can't be found, continue to the next step.

On the **Outlook** screen that asks you to check your information, do the following, and then tap **Sign in**:

For this field	Do this
Email address	Verify that your email address appears correctly.
Password	Tap **Show password**, and then verify that the password is correct.
User name	Verify that the user name is correct.
Domain	If you're using an Outlook Web App account or a hosted Microsoft Exchange account, you typically don't have a domain. Leave the **Domain** box empty. Optionally, some devices may use the Exchange Server domain: **collaboration**

8) Do one of the following, depending on if the account settings are found:

   - If the account settings are found, wait for your Exchange Server email, calendar, and contacts to be synced to your phone. You're done setting up your account. Go to the last step in the procedure.
   - If the account settings can't be found, continue to the next step.

9) If the correct settings can't be found, tap **Advanced**, do the following, and then tap **Sign in**:

   - Repeat step 7 and verify that the current information is correct.
   - Tap the **Server** box, and enter the server address: **mobile.apptixemail.net**.
   - Tap **Show all settings**, and then verify that the **Server requires encrypted (SSL) connection** setting is correct.

10) If the **New password** needed message appears after a few moments, tap **Set**, tap the **New password** box and enter a password that's at least 4 digits. Tap the **Confirm password** box and type the same password, and then tap **Done**.

    This is the password you will enter on the lock screen to unlock your phone. Whether you need to enter a password for your phone depends on the security requirements that are set on the Exchange Server for your account,

Windows Mobile 6.5 and Earlier

Smart Phones with an operating system of Windows Mobile 6.5, or earlier, typically synch email, contacts, calendar, and tasks with an Exchange mailbox. The features associated with ActiveSync enabled phones may differ depending upon the phone device itself or the nature of the licensing agreement for utilizing ActiveSync.

1. From the device' s home screen select **Start** -> **Programs** (Optionally select the **ActiveSync** icon)
2. Select the **ActiveSync** icon
3. Select **Set up your device to sync with it** from the Exchange Server support option.

4. For the server address type in **mobile.apptixemail.net** and make sure the box for **This server requires an encrypted (SSL) connection** is checked. Select **Next**

5. Enter the remaining setup information as requested:

Username: Enter your user ID (This is your windows user name ***Ex:*** *john.doe, not your email address)*

Password: Enter your Exchange mailbox password (*case sensitive*)

Domain: **Collaboration** (Optional. For some devices you may leave this blank)

* Make sure the box for **Save password** is checked then select [**Next]**

6. Select the items that you would like to sync with your device by checking the box next to each item. Select [**Finish].**

7. The first time your device syncs you may receive a warning prompt providing information about the initial synchronization of the device. Select [**OK]** to proceed and synchronize your device.

Configuration of ActiveSync for WM6 is now complete.

Other Important ActiveSync Settings:

Set Schedule for receiving email: **Start | Programs | ActiveSync | Menu | Schedule | Select from drop-down** (Peak/Off Peak). – As Item Arrive‖ = Push. Battery life is impacted the more often you receive email.

Determine how much email is pulled into each folder: **Start | Programs | ActiveSync | Menu | Options | Click on Email icon > Settings…. | Select from drop-down** (Select the number of days of email to download…3 is the default)

Troubleshooting ActiveSync Setup

If you are having difficulty getting your ActiveSync enabled device to connect and communicate with your Exchange mailbox, do the following as standard steps for troubleshooting:

1. Contact your IT Admin to make sure that your mailbox has been enabled to communicate using ActiveSync. If your mailbox has not been enabled from the Apptix Control Panel, the activation of the mobile device will fail.

   Find the User mailbox by selecting **Hosting** | **Exhange** | Click on the User' s Display Name hyperlink | **General** Tab | Check the **ActiveSync** checkbox option | [Submit].

   NOTE: If the ActiveSync checkbox option is not selectable that means that your account does NOT contain any ActiveSync Resources that can be used to setup wireless ActiveSync. Purchase the ActiveSync Resources for your subscription from the **Billing | Add Resources** Control Panel options.

2. Make sure your wireless carrier has enabled your account for **data services**. You will need to have both voice and data activation with your wireless carrier for your account in order to obtain email, and other data (web browsing, etc), on your mobile device.

3. Make sure that your mobile device is online and has a strong data signal. The device can have either a wireless or a data connection from your wireless carrier (3G, etc), but at least one of the online services must be active in order to setup the device.

4. Double-check the data entry of the server settings, username, email, password, etc. when setting up your device. It is easy to mistype one of the settings inputs which will cause the configuration to fail.